2013 & 2014 Individual Auto Calc Instructions

Welcome to the Village's new individual automatic calculating income tax form. These instructions are to help guide you through the form. Please contact us if you have any difficulty utilizing this form. We will also welcome suggestions or comments on how to improve our form for the future.

*Please Note: Some web browsers (Google Chrome, Firefox) attempt to open PDFs with their own plug-ins, which may remove interactive functionality from PDF Fill-in forms. It is strongly recommended that you download such forms by right-clicking their links, and open them with **Adobe Reader** so that they will function correctly. Broken links can be reported to **IncomeTax@waltonhillsohio.gov**.*

For best results, please use "Internet Explorer' or "Safari" web browsers.

A few things to remember when working through the form.

- The **Tab** key will take to the next field. If there is no information to be supplied in a field simply hit the **Tab** key;
- The **Enter** key will take you to the next line within the field; and
- The form allows for only four W-2s to be entered. If you have more than four W-2s, you may add W-2s that have tax withheld for the same municipality and enter it on one of the four lines available.

Getting started

When you first click on the auto calc form, a dialog box with a message (do not be alarmed) will come up and provide information about the auto calc return. Click OK and the form should appear. There will be a large rectangular bluish/gray box to the right of "Name and Address". Click in the top left hand corner of the rectangular box. Another dialog box will let you know that you cannot save this return on your computer. You may only print it. Click "close". Enter your name or names (joint account) if it is a joint account on the first line and hit the **Enter** key. Enter your address and hit the **Enter** key. Enter your city, state, and zip and hit the **Tab** key.

The cursor will then move to:

Social Security No. - Enter your social security number without dashes or spaces and hit the **Tab** key.

Home Telephone No. - Enter your telephone number without dashes or spaces and hit the **Tab** key.

Business Telephone No. - Enter number without dashes or spaces and hit the **Tab** key.

Spouse's Social Security No. - Enter your spouse's number without dashes or spaces and hit the **Tab** key.

Spouse's Name - Enter spouse's name and hit the **Tab** key.

Home Telephone No. - Enter spouse's number without dashes or spaces and hit the **Tab** key.

Business Telephone No. - Enter spouse's number without dashes or spaces and hit the **Tab** key.

Filing Status - Click on the appropriate box and hit the **Tab** key.

Resident/Non-Resident Status - Click on the appropriate box and hit the **Tab** key.

Moving Info - Click on the "down arrow box'' and click on the appropriate dates and hit the **Tab** key.

Landlord Name - Enter landlord's name and hit the **Tab** key.

Landlord Address - Enter landlord's business address and hit the **Tab** key.

W-2 and 1099 Information – After entering the basic information, the cursor should be positioned under "Employer's Name" in the W-2 and 1099 Table. Enter the employer's name and hit the **Tab** key and then enter the municipality of the W-2 (Box 20 of the W-2) and hit the **Tab** key. If the municipality is not Walton Hills enter the tax paid (Box 19 of the W-2) under "Tax Paid to Other Cities" and hit the **Tab** key. If the municipality is Walton Hills enter the tax paid (Box 19 of the W-2) under "Walton Hills Tax Paid" and hit the **Tab** key. The cursor will move to the next line to enter another W-2. If there are no more W-2s or 1099s simply tab through the rest of the table including the "Totals" line. The table will adjust the numbers throughout the return. The cursor will then position itself in Box 1 of Line 1.

Line 1 Wages, salaries, tips, etc - No entry. Amount automatically entered. Hit **Tab** key.

Line 2 Other taxable income - Enter the total of business income (Schedule C), rental or supplemental income (Schedule E), other income. If there is any loss carry forward from prior years, please offset against the other taxable income, not wages and salaries. Hit the **Tab** key.

Line 3 Total taxable income - No entry. Amount automatically entered. Hit **Tab** key.

Line 4 Walton Hills tax due before credits - No entry. Amount automatically entered. Hit **Tab** key.

Line 5 Estimated taxes payments made to Walton Hills - Enter estimated taxes paid. Hit **Tab** key.

Line 6 Taxes withheld and paid to Walton Hills - No entry. Amount automatically entered. Hit **Tab** key.

Line 7 Overpayment from prior years - Enter prior year tax credits. Hit **Tab** key.

Line 8 Taxes withheld and paid to other localities - No entry. Amount automatically entered. Hit **Tab** key.

Line 9 Total credits - No entry. Amount automatically entered. Hit **Tab** key.

Line 10 Overpayment - No entry. Amount automatically entered. Hit **Tab** key.

Line 11 Amount of overpayment to be credited to next year's estimate - Enter amount of overpayment to be applied to the following tax year. Hit **Tab** key.

Line 12 Amount of overpayment to be refunded - No entry. Amount automatically entered. Hit **Tab** key.

Line 13 Tax due - No entry. Amount automatically entered. Hit **Tab** key.

Line 14 Penalty and interest - All unpaid taxes shall bear interest at the rate of 6% per year. Penalties on unpaid taxes are calculated at 10% per year or $10.00, whichever is greater. Enter the appropriate amounts. Hit **Tab** key

Line 15 Estimated income - Enter estimated income for the following year. Hit **Tab** key.

Line 16 Estimated tax due - No entry. Amount automatically entered. Hit **Tab** key.

Line 17 Taxes to be withheld and paid to Walton Hills Income Tax and other localities - Enter taxes paid or withheld for the following year. Hit **Tab** key.

Line 18 Prior credit applied to estimated tax payments - No entry. Amount automatically entered. Hit **Tab** key.

Line 19 Net estimated tax due - No entry. Amount automatically entered. Hit **Tab** key.

Line 20 Total amount due - No entry. Amount automatically entered. Hit **Tab** key.

The cursor will then move to the box that would allow the Village to discuss your return with your tax preparer. If you do not want to allow the Village to discuss your return with your tax preparer simply hit the Tab key, otherwise click on the box.

Your return is ready to be printed. Click on the print icon. Once printed, please sign and date your returns and have your tax preparer sign your return also. Please attach all W-2s, 1099s and schedules to the return.